

## Overview

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This document explains how to upgrade from webMethods EDI Module: Core Component 4.x, webMethods EDI Module: Trading Networks Component 4.x, and webMethods EDI Module: EDIINT Component 4.x to the corresponding 6.5 modules: the EDI Module and the EDIINT Module.



**Note:** In webMethods EDI Modules 6.1, the WmEDIforTN package was added to the EDI Module. The pre-6.1 component, called webMethods EDI Module: Trading Networks Component, no longer exists.

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6.5 webMethods components use flat file schemas instead of templates to convert and validate EDI documents. If you upgrade to EDI Module 6.5, then, you must do the following:

- For EDI transactions, upgrade to EDI Module 6.5 and create flat file schemas from original SEFs or IDOCs.
  - For non-EDI documents, upgrade to EDI Module 6.5 and convert existing 4.x templates to flat file schemas.
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**Note:** If you upgrade to EDI Module 6.5 and later add an EDI document type to Trading Networks, Trading Networks creates a corresponding flat file schema automatically.

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For more information about flat file schemas, including modifying them to perform validation, see the *Flat File Schema Developer's Guide* and the *webMethods EDI Module User's Guide*.

## Upgrade and Create Flat File Schemas for EDI Transactions

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- 1 If you are upgrading to EDI Module 6.5 and plan to use Trading Networks, upgrade to Trading Networks 6.5. For instructions, see that upgrade procedure.
  - 2 Download webMethods Installer 6.5 from the webMethods Advantage Web site at <http://advantage.webmethods.com> and install the EDI Module and the EDIINT Module (optional) on the same machine as Integration Server 6.5. When the installer prompts you to specify the installation directory, specify the webMethods installation directory (by default, webMethods6). The installer automatically installs the components you select in the Integration Server 6.5 installation directory.
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**Important!** For complete instructions on installing, configuring, and completing the installation of the 6.5 EDI Module and EDIINT, see the *webMethods Installation Guide*.

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- 3 EDI Module 6.5 offers new flat file validation and formatting options. These services let you reformat the values of fields according to the EDI X12 and UN/EDIFACT standards. The format services are enabled by default. Mapping services written for EDI Module 4.x, however, expect field values to contain unformatted values. You can (but do not have to) modify your mapping services to handle field values reformatted according to the EDI X12 and UN/EDIFACT standards.

- If you do not want to modify mapping services to handle field values reformatted according to the EDI X12 and UN/EDIFACT standards, the flat file schemas you create cannot have format services specified. To prevent format services from being specified when you create flat file schemas, follow these steps:

- 1 Navigate to the *Integration Server\_directory*\packages\WmEDI\config and back up the format.xml file.
- 2 Remove all <DatatypeFormat> tags from the format.xml file.
- 3 Restart Integration Server.

If you later want to include format services in flat file schemas and you have not customized the flat file schemas using Developer, restore the original format.xml file, delete the flat file schemas, and recreate them using the EDI Module 6.5 service `wm.b2b.edi:SEFParse`.

If you later want to include format services in flat file schemas and you have customized the flat file schemas using Developer, add the format services to each flat file schema using Developer. For instructions, see the *Flat File Schema Developer's Guide*.

- If you want to modify mapping services to handle formatted values, follow these steps:
  - 1 Call the `wm.b2b.edi:convertToValues` service in the EDI Module's WmEDI package instead of the Integration Server service `pub.schema:validate` to validate EDI documents. Set the `validate` flag in the `wm.b2b.edi:convertToValues` service to `true`.
  - 2 If the mapping services contained formatting operations that are now performed by the flat file schemas, remove those operations from the services.

For more information and for detailed instructions, see the *Flat File Schema Developer's Guide*.

- 4 If you are upgrading to EDI Module 6.5, create flat file schemas for EDI transactions using the instructions in the *webMethods EDI Module User's Guide*. Name each flat file schema using this convention:

`EDIFFSchema.document_standard.Vdocument_standard_version:Template_name`

This naming convention provides backwards compatibility with 4.x versions. The EDI Module 6.5 service `wm.b2b.edi.templateMgr:getTemplate` has been modified to return the name of a flat file schema, and it uses this naming convention to construct the correct

name. The flat file schema name is then used by the EDI Module 6.5 services `wm.b2b.edi:convertToString` and `convertToValues`. (In 4.x versions, these services used a template name.)

- 5 If you are upgrading to EDI Module 6.5 and plan to use Trading Networks, open Developer and run the `wm.b2b.editn.migration:updateBizDocs` and `wm.b2b.editn.migration:updateProcessingRulesAttribute` services in the EDI Module's `WmEDIforTN` package.

## Upgrade and Convert Existing Templates to Flat File Schemas for Non-EDI Documents

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- 1 If you are upgrading to EDI Module 6.5 and plan to use Trading Networks, upgrade to Trading Networks 6.5. For instructions, see that upgrade procedure.
- 2 If you are upgrading to EDI Module 6.5, follow these steps:
  - a Navigate to the `Integration Server_directory\packages\WmEDI\pub` directory in the 4.x installation and back up the `template.bin` file.
  - b If you have flow services that have built-in 4.x templates (that is, templates that are stored in the pipeline rather than in the template manager), do the following for each flow service:
    - 1 Store the flow service's built-in templates in the 4.x template manager by running the service `wm.b2b.edi.templateMgr:putTemplate` for the flow service.
    - 2 Modify the flow service to use the `wm.b2b.edi.templateMgr:getTemplate` service to get the templates from the template manager.
    - 3 Remove the built-in templates from the flow service.
  - c Migrate the 4.x templates to the 6.5 installation, as follows:
    - 1 Start Integration Server 4.x, then open Integration Server Administrator.
    - 2 Go to the **Packages > Management** page.
    - 3 Locate a package other than `WmEDI` that contains templates to migrate. In the **Archive** column for the package, click . The system displays the **Packages > Management > Default > Archive** page.
    - 4 Scroll to the bottom of the page, then click **Create Archive**. The system creates a zip file that contains the package and places the zip file in the `Integration Server_directory\replicate\outbound` directory.
    - 5 With the exception of the `WmEDI` package, repeat these steps for all packages that contain 4.x templates to migrate to the 6.5 installation.
    - 6 Navigate to the `Integration Server_directory\replicate\outbound` directory in the 4.x installation.

- 7 Copy all the zip files you just created to the *Integration Server\_directory\replicate\inbound* directory in the 6.5 installation.
  - 8 In the Integration Server Administrator for the 6.5 installation, go to the **Packages > Management > Install Inbound Releases** page.
  - 9 In the Release file name list, click one of the zip files you just copied to the 6.5 installation, then click **Install Release**. The system installs the package, then displays a message that says the package has been installed and activated.
  - 10 Repeat the previous step for each of the zip files you copied to the 6.5 installation.
- 3 Download webMethods Installer 6.5 from the webMethods Advantage Web site at <http://advantage.webmethods.com> and install the EDI Module and the EDIINT Module (optional) on the same machine as Integration Server 6.5. When the installer prompts you to specify the installation directory, specify the webMethods installation directory (by default, webMethods6). The installer automatically installs the components you select in the Integration Server 6.5 installation directory.



**Important!** For complete instructions on installing, configuring, and completing the installation of the 6.5 EDI Module and EDIINT, see the *webMethods Installation Guide*.

- 4 If you are upgrading to EDI Module 6.5, follow these steps:
  - a Move the backup copy you made of the 4.x template.bin file to the *Integration Server\_directory\packages\WmEDI\pub* directory in the 6.5 installation.
  - b Go to the webMethods EDI Module home page at [http://Integration Server\\_6.1\\_host:Integration Server\\_6.5\\_port/WmEDI](http://Integration Server_6.1_host:Integration Server_6.5_port/WmEDI). Click **Migrate**, then click [here](#). The page lists the 4.x templates you just copied to the 6.5 installation.
  - c Follow the instructions to convert each 4.x template into a flat file schema. The system stores each flat file schema in the same package that contains the original template. The naming convention for flat file schemas is as follows:
 

EDIFFSchema.document\_standard.Vdocument\_standard\_version:Ttemplate\_name

If the original template does not indicate a document standard or document standard version, *document\_standard* and *document\_standard\_version* do not appear in the name.

This naming convention provides backwards compatibility with 4.x versions. The `wm.b2b.edi.templateMgr:getTemplate` service in the EDI Module 6.5's WmEDI package has been modified to return the name of a flat file schema, and it uses this naming convention to construct the correct name. The flat file schema name is then used by the `wm.b2b.edi:convertToString` and `convertToValues` services in the 6.5 EDI Module's WmEDI package. (In 4.x versions, these services used a template name.)
- 5 If you are upgrading to EDI Module 6.5 and plan to use Trading Networks, open Developer and run the `wm.b2b.editn.migration:updateBizDocs` and

wm.b2b.editn.migration:updateProcessingRulesAttribute services in the EDI Module's WmEDIforTN package.

When you are sure the entire 6.5 installation is working correctly, uninstall the components in the old installation in the order shown below.

## Uninstall webMethods EDI Module: Core Component 4.x

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When you are sure the 6.5 installation is working correctly, uninstall the 4.x components by deleting the WmEDI and WmEDIsamples packages from the Integration Server in the 4.x installation. See the *webMethods Integration Server Administrator's Guide* for instructions on deleting packages.

## Uninstall webMethods EDI Module: EDIINT Component 4.x

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When you are sure the 6.5 installation is working correctly, uninstall the 4.x components by deleting the WmEDIINT package from the Integration Server in the 4.x installation. See the *webMethods Integration Server Administrator's Guide* for instructions on deleting packages.

## Uninstall webMethods EDI Module: Trading Networks Component 4.x

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When you are sure the 6.5 installation is working correctly, uninstall the 4.x components by deleting WmEDIforTN package from the Integration Server in the old installation. See the *webMethods Integration Server Administrator's Guide* for instructions on deleting packages.